

# TOWN MANAGER EVALUATION

## FY2012

**Select Board Member: Jim Wald**

*For the purposes of this document, the evaluation terms shall be defined as:*

**Commendable** = Performance surpassing reasonable expectations

**Satisfactory** = Performance meeting reasonable expectations

**Needs improvement** = Performance below reasonable expectations, with improvement likely

**Unsatisfactory** = Performance below reasonable expectations, with improvement unlikely

**Unable to judge** = Insufficient information available for evaluation (Please explain)

AREAS OF RESPONSIBILITY	Commendable	Satisfactory	Needs Improvement	Unsatisfactory	Unable to Judge	COMMENTS
<b><u>FISCAL MANAGEMENT</u></b>						
<b>Annual Expectations</b>						
1. Plans and organizes the preparation of an annual budget.	X					See below.
2. Prepares budget in conformance with the Select Board's Budget Policy Guidelines memo.	X					See below.
3. Plans, organizes and administers the adopted budget within approved revenues and expenditures.	X					<p>Collective comment for 1-3: As I have noted in the past, when Mr. Musante was Finance Director, he was chosen to give a presentation on budgeting to a conference of municipal officials from the entire state. We learned that both Amherst and John had a reputation for outstanding financial acumen and administration. We are fortunate in having our expert recent Finance Director as Town Manager, but this necessarily entailed a transition in other areas, as new staff moved up. The choice of Mr. Pooler as Finance Director was excellent, and he is now fully integrated into our system.</p> <p>The budget process has never been better or more smoothly run. Town Manager and Finance Director make an excellent team. The Joint Capital Planning Process (of which I am a part) runs like clockwork, allowing us to consider all options fully and deliberately, without stress or haste. This in turn makes for a much better warrant and a more effective Town Meeting debate among the citizenry as a whole.</p>
<b>FY12 Goal</b>						
4. <b>(FY12 Goal #1)</b> The Town Manager shall develop specific <b>recommendations for</b>	X					The Town Manager has led admirably in all these areas, and we enjoy a stable budgetary situation and increased

<p><b>consideration by the Select Board</b> to address the ongoing revenue challenge, to include:</p> <ul style="list-style-type: none"> <li>a. generating new revenue;</li> <li>b. reducing expenses through efficiencies in Town structure and service delivery, including regionalization of services where appropriate;</li> <li>c. negotiating contracts through the collective bargaining process that are reflective of the community's capability and willingness to support, and mindful of the stagnant economy and conservative projections for the next few years;</li> <li>d. pursuing an increased economic development profile to increase the tax base and reduce the burden on residential property taxpayers.</li> </ul>						<p>bond rating because we have achieved this without either a new override or harsh cuts to staff and services. Among other things, we were delighted that good administration and foresight on the part of the Town Manager allowed us to achieve savings in health care costs without limiting actual benefits—thus easing pressure on other parts of the budget. The Town Manager also led an effective process for review of teachers' retirement benefits.</p> <p>Considering the difficult times, we have come through very well.</p> <p>Town Manager has been energetic in pursuing regionalization.</p> <p>Finding economic development opportunities is difficult, as we are to some extent limited by the hand that we are dealt, but I hear across the board that people feel the commercial and regulatory atmosphere has improved. The green projects such as the solar farm are among the Town Manager's most ambitious and potentially rewarding initiatives. That this one has not yet borne fruit is not for want of trying on his part. Were it not for the lawsuit that has been holding us back, it would have been ready to go.</p>
<b><u>RELATIONSHIP WITH THE BOARD AND TOWN MEETING</u></b>						
<b>Annual Expectations</b>						
5. Makes professional recommendations to the Board on items requiring Board action.	X					The Town Manager is the epitome of professionalism.
6. Interprets and executes the intent of Board policy.	X					A better team partner would be hard to imagine. We have a collegial and effective relationship. Good sense of boundaries as well as partnership.
7. Maintains a professional, impartial and effective working relationship with the Board.	X					As above.
8. Presents to Town Meeting with thorough preparation and clear communication.	X					The Town Manager always speaks calmly and displays a mastery of the facts, making even complex issues more comprehensible. Some members took issue, however, with his participation in specific debates (see also note at end of form).
<b>FY12 Goal</b>						
9. <b>(FY12 Goal #6)</b> The Town Manager shall keep the Select Board fully informed by:	X					(Some of this is also covered above.)
a. responding to and initiating improved communication efforts;						The Town Manager has certainly attempted to increase communication (good to begin with) across the board (no

<ul style="list-style-type: none"> <li>b. recognizing that any issue or change that directly or significantly impacts the community falls within the Select Board's authority to provide feedback;</li> <li>c. allowing the Select Board opportunity to provide feedback on policy/practice initiatives and changes before implementation;</li> <li>d. involving the Select Board in the determination of collective bargaining strategies for the current contract process, and keeping us updated on its progress;</li> <li>e. ensuring that all members of the Select Board are aware of anything significant before it appears in the newspaper.</li> </ul>					<p>pun intended). He keeps us very promptly informed of initiatives and breaking news via email and cell phone. His performance during the October weather emergency—even though he was still on partial medical leave—was a case in point.</p> <p>This is also evident in the agenda-setting meetings, which always allow for full raising/exchange of ideas.</p> <p>The Town Manager has done a fine job of keeping us apprised of collective bargaining issues (note: handled in executive session).</p> <p>We never feel that we are out of the loop; on the contrary, we feel well-informed.</p>
<b><u>LONG RANGE PLANNING</u></b>					
<b>Annual Expectations</b>					
10. Maintains a knowledge of new technologies, systems and methods, etc. in relation to Town services.		X			<p>As if a few other cases, I mark this “satisfactory” only because it is still a work in progress. The Town Manager avails himself effectively of “news flashes” and has even now created a Twitter account as another means of sharing Town news. Above all: The Town Manager, although still learning about new technologies as an individual, has, as an administrator, been extremely supportive of their creative and efficient use on the part of the Town as a whole. He has been very supportive of the IT initiatives and implementation by specialist staff such as IT head Kris Pacunas and GIS administrator Mike Olkin. Examples include steady improvement of Town website and Town Manager's understanding of and strong support for complete upgrade of downtown wireless as part of this years capital planning process.</p>
<b>FY12 Goals</b>					
11. <b>(FY12 Goal #7)</b> The Town Manager shall provide the Select Board with a detailed assessment of Town-owned buildings regarding their current use, and anticipated future benefit and liability. He will make recommendations on whether or not it is in the Town's best interest to maintain ownership of each one. If any recommendations are to repurpose a building or not maintain its ownership, he will suggest how best to proceed.		X			<p>Marking this as “satisfactory” rather than commendable indicates that this process is not yet far advanced.</p> <p>Given the other pressing obligations and priorities, this is perhaps understandable.</p>
12. <b>(FY12 Goal #8)</b> The Town Manager shall help Amherst become a greener, more sustainable community by initiating and advocating for new "green" efforts and programs, and he shall inform the Select Board and the community about these efforts and their results.	X				<p>The Town Manager is an enthusiastic supporter and clear leader here. Suffice it to mention the solar farm, Green Communities status, and new tree-planting/green infrastructure initiative. He rarely misses an opportunity to declare that he wants the Town to be a real leader in this area.</p>
13. <b>(FY12 Goal #9)</b> The Town Manager shall create, through consultation with each		X			<p>The “satisfactory” mark here may reflect the state of my knowledge, as much as the actual state of affairs, i.e. I am</p>

department's staff, a recommended staffing plan that suggests the optimal number and types of positions in each department to best address current service levels and key needs. This will provide a framework for prioritizing recommendations for future hiring. Such future recommendations should address the full cost of each position, including post-employment benefits.						not personally familiar with the details of such plans. That said, it is abundantly clear that the Town Manager's grasp of employment issues is firm. As indicated elsewhere on this form, he has made excellent hires in crucial areas.
<b><u>STAFF AND PERSONNEL RELATIONS</u></b>						
<b>Annual Expectations</b>						
14. Models sound personnel procedures and practices in oversight of human resources function.	X					See above.
15. Leads, directs and develops Town staff.	X					See above.
16. Develops good staff morale and loyalty to the Town.		X				I am fully confident in marking 14 and 15 "Commendable." I mark 16 "Satisfactory" rather than "Commendable" only for the following reason: From our direct point of view, morale has improved in comparison with some points in the past. At the same time, some employee feedback indicates a desire for more progress on this front. Performance is satisfactory here, but the issue should be clarified and discussed.
17. Recruits and assigns the best available personnel in terms of their competencies.	X					Town Manager has done an excellent job in filling vacant key positions. We have never had a better team in place. In particular, this year, we have important hires in Human Resources and Planning and Inspections. The latter will be crucial as we deal with resident concern over the rental housing market and related issues.
18. Leads the negotiations of labor contracts representing Town interests and Board guidelines.	X					See above, e.g. 9.
<b>FY12 Goals</b>						
19. <b>(FY12 Goal #4)</b> The Town Manager shall make high staff morale a priority. Efforts shall include: a. increasing communication between himself and staff at all levels, in order to inform, engage and solicit feedback; b. encouraging a workplace culture of civility, mentoring and receptivity to new ideas and innovations for improved service delivery.		X				Our experience of the Town Manager shows him to be a highly professional, courteous, open administrator, prompt to respond to any question, suggestion, or request for detailed information. In dealing with us and with staff (19.b.) he has, in our experience, shown himself receptive to suggestions, innovation, new ideas.  As in the case of # 16, I therefore mark this rubric "satisfactory" mainly because there is evidently some division of opinion in staff responses regarding communication and the like. More conversation about the matter can only help.
20. <b>(FY12 Goal #5)</b> The Town Manager shall conduct an assessment of the Town's Human Resources needs and capabilities, in order to determine how well we are	X					The choice here is something of a judgment call, given my possibly incomplete knowledge of staffing plan details (see # 13, above). That said, both his general attention to

recruiting, hiring, retaining and supporting Town staff, and how aligned we are with best practices in the human resources field. The Town Manager shall inform the Select Board about the assessment results and his plan to address any necessary changes.						staffing needs, and in particular, his hiring of a new Human Resources Director to fill the slot opened by retirement sends a strong symbolic signal and represents equally strong practice.
<b><u>COMMUNITY and INTERGOVERNMENTAL RELATIONS</u></b>						
<b>Annual Expectations</b>						
21. Ensures that an attitude and feeling of helpfulness, courtesy and sensitivity to public perception exists in employees coming in contact with the public.	X					
22. Represents the Town to media as Chief Public Relations spokesperson on Town government issues.	X					Mr. Musante speaks clearly and effectively on all issues. We are moreover pleased at his willingness to represent the Town at a wide variety of public events.
23. Maintains awareness of developments and plans in other jurisdictions, including the colleges and university, that may relate to or affect Town government.	X					The Town Manager keeps himself admirably informed.
<b>FY12 Goals</b>						
24. <b>(FY12 Goal #2)</b> The Town Manager shall continue to strengthen relationships with UMass and the Colleges, for concrete progress in areas that improve the community's quality of life by: a. mitigating the impacts of a significant student population: on neighborhoods, on demand for public safety resources, on parking and traffic issues, and so forth; b. compensating for the significant amount of non-taxable property; c. pursuing issues of mutual benefit to the Town and the academic institutions	X					<p>This is a tough issue because many people assume we have more leverage over or influence on these institutions than we in fact do. For example, there is great and justifiable concern over the effect of a large student population on the rental market and neighborhood quality of life. Yet, even under the best of circumstances, the town cannot "require" the University to house more students than it chooses to house—i.e. certainly nothing close to the entire student body.</p> <p>But one hallmark of recent policy has been the consistent effort on the part of the Select Board Chair and Town Manager to engage the colleges on the issue of both economics and behavior. We saw this with regard to Gateway last year, and in the ongoing attempt to integrate students as responsible residents of the town.</p> <p>Noting, moreover, that the Town Manager is or will be dealing with new heads of all three local institutions of higher learning, it is clear that he has done an excellent job of establishing good communications and relationships that will continue develop and bear fruit in the coming years.</p>
25. <b>(FY12 Goal #3)</b> The Town Manager shall actively engage the community to: a. provide information about Town successes and challenges, and to seek support for initiatives that address the latter; b. gather information about strengths and weaknesses of municipal service delivery		X				<p>"Satisfactory" here is again a sort of judgment call. The Town Manager does an excellent job of keeping the public informed of policies and decisions and is eager and willing to discuss them when there is resident interest. It may be that a more systematic or formalized system for generating regular feedback regarding services could be developed.</p>

						Related, perhaps to this rubric, is one of the few areas of notable complaint: although no town is ever fully ready to cope with disaster and it can be difficult for residents to show patience in the face of adversity, the message came through strong and clear: the Town’s response to the October blizzard--especially considering how many factors were not under our direct control—was generally satisfactory but could nonetheless have been better, particularly as concerned communication. The Town Manager, upon his return to regular duty (for it will be recalled that he was on medical leave during this period) made clear his willingness to hear feedback and develop new and more effective approaches for the future.
<b><u>GENERAL EXPECTATIONS</u></b>						
26. Feel free to comment on strengths or weaknesses in any of the following areas:						<b>Comments See below.</b>
Professionalism		Community spirit				
Leadership		Defends conviction under pressure				
Enthusiasm		Openness to differing views/new information				
Accessibility		Resourcefulness				
Setting priorities		Advocacy with State and Federal Government				
Communication style		Crisis management				
Listening skills		Responsiveness				
Public speaking		Facilities management				
<b><u>OTHER COMMENTS</u></b>						

27. If you are willing to share any additional information, insight, or experience relevant to this evaluation, please do so here.

As I believe that I have covered the formal rubrics extensively above, I will keep these remarks brief.

As should be apparent, I hold the Town Manager in high esteem and have found it easy and pleasurable to work with an administrator possessed of both great professionalism and warmth. I can honestly say that, in my experience, things have never run more smoothly. Comments of those with greater experience from among both government and community convey the same message.

I see little to criticize here on the basis of my personal experience, though I note areas in which others have seen fit to do so:

1) Comments from town staff, though clearly quite positive overall and in the specifics, nonetheless include a minority (though a recognizable body) of more critical remarks. Rubrics include morale, communication, feedback, patterns of authority and delegation, and the like. Some of these remarks may reflect areas of limited interaction with the Town Manager or circumstances in which his direct control is limited.

It is difficult to speculate further on the basis of check-off forms rather than prose feedback. Given that we on the Select Board do not have direct experience of or access to these interactions between Manager and staff, I feel it important to note these areas as something deserving of discussion.

2) Critical comments from the public at large were both fewer and more specific:

a) Occasionally, someone complained about alleged slow or lacking response to a question or complaints. Clearly, this was a rare exception rather than the rule. It was hard to tell whether the criticism arose from actual lapses in communication (policy? process? person?) or differing expectations. Still, if people feel they are not being heard, the matter is worth pursuing. Good communication is essential to good politics, so we may see this as a positive opportunity to review our assumptions and procedures.

b) A handful of complaints regarding the Town Manager's participation in recent Town Meeting discussions. We note that the Town Government Act gives the Town Manager the right to speak and vote. Mr. Musante, like Mr. Shaffer, but unlike some of his predecessors, chose to exercise it. Clearly, the Town Manager is an administrator rather than a politician, yet he must develop policies, which he obviously stands behind as both a highly trained professional and the person responsible for overseeing or implementing them. This is one of the subtleties (one hesitates to call it a contradiction) of our political process. Obviously, the Town Manager chooses how and when to exercise his rights in the political forum, but he may find it helpful to explain to the public the basis for this choice.

On balance, it is striking that we find so little criticism.

In summary: I have complete confidence in the Town Manager and the ever-stronger leadership team that he has assembled. He has helped us to weather more than one crisis and put us on a path to begin significant new undertakings that will shape the Town with an eye to the long term, and not just the current budgetary cycle. We hear what outsiders think of Amherst in comparison with their own towns. Amherst has secured a reputation as a town with calm, effective, reliable government and management. That is just what we hope to hear.